Apple CRM Pilot — Moving to the new system

Moving to Apple CRM is an exciting time for you and your team. During this transition period, some data will be temporarily unavailable as IS&T teams are working to transition data and launch the new system. This guide outlines key considerations to be aware of during this time (2-3 days).

Using Engage and Apple CRM during Apple CRM Go-Live

During the first few days of the launch of Apple CRM, some customer data will be temporarily unavailable. Below is a summary of what will be unavailable and a highlight of key workflows that will be available as well as suggestions for how approach each day.

	1 Day before Apple CRM Release US – Apr 18, EMEA – Apr 27	Apple CRM Release Day US – Apr 19, EMEA – Apr 28	1-3 Day after Apple CRM Release US – Apr 20, EMEA – Apr 29
You will be unable to…		⊘ Access customer and transaction data created in the past 3 weeks in Engage ⊘ Use Engage to create new data ⊘ View past 3 weeks of Retail Business dashboard Customer tabs data (MGR+)	⊘ Use Engage to create new data **Note –** any activity in Engage post-launch will not link / move to Apple CRM. ⊘ View past 3 weeks of Retail Business dashboard (GBI) Customer tabs data (MGR+). Data available in 1–3 days
You will be able to…	● Use Engage normally ● Look up and transact with Business customers in store through EasyPay	● Begin creating new Quotes, Opportunities, Activities (Tasks, Notes, Calls, and Meetings), and Introductions in Apple CRM ● Look up and transact with Business customers in store through EasyPay	● Use Apple CRM normally ● All customer and transactional data will be available from Engage **Note –** the past 3 weeks of Engage data will begin to appear over the next 2-3 days in some cases in batches vs. all at once.
Use this time to…	Make note of Opportunities and Quotes to be created the next day in Apple CRM, including anything urgent that needs to be done on day 1 (e.g., customer orders to be booked)	✓ Get to know the new system ✓ Create new Opportunities and Quotes from the prior day or this day ✓ Follow up with New Introductions (Leads)	Use Apple CRM as normal to work with customers, create Quotes, and place orders

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